



**POSITION TITLE:** AmeriCorps Financial Empowerment Coach  
**REPORTS TO (daily):** AmeriCorps Site Supervisor  
**REPORTS TO (overall):** MAUW AmeriCorps Program Director  
**DATE LAST UPDATED:** July 7, 2014

**PROGRAM OBJECTIVES:**

The Michigan Association of United Ways (MAUW) Financial Empowerment Coaching Corps will mobilize 19 AmeriCorps members who will provide individualized financial empowerment coaching throughout the State of Michigan. At the end of the 1st program year, the AmeriCorps members will be responsible for assisting 1,750 individuals with financial empowerment services and helping 1,250 individuals increase their financial knowledge. As milestones to these goals, the Financial Empowerment Coaching program will assist with objectives including, checking and savings account acquisition and proper management, along with individualized goals to increase an individual's self-sufficiency. In addition, the AmeriCorps members will leverage an additional 300 volunteers that will be engaged in providing referrals for financial empowerment coaching and assisting in community events.

**GENERAL DESCRIPTION:** The AmeriCorps member will serve as an integral member of the United Way/Community Partner team to provide individualized financial coaching with the goal of providing increased financial stability. This AmeriCorps Coach will provide an added service to individuals receiving services nonprofits who desire to become more self-sufficient. This member will provide outreach to locate community partners if needed in order to assure that they provide these individualized services. This member will also provide the most up-to-date resources for staff of their host site and partner organizations on financial coaching.

**ESSENTIAL DUTIES & RESPONSIBILITIES:**

- Intake of individuals into individual financial services (provide initial assessment meeting).
- Provide one-on-one financial coaching to meet desired objectives and help individuals/families towards self-sufficiency.
- Outreach to nonprofits regarding financial services if needed.
- Follow up with clients regarding their use of financial services and progression to their goals; document progress.
- Attend training events, learn and explore in order to promote the mission and objectives of the program.

- Collaborate with various state and local organizations to build awareness of one-on-one financial coaching and the benefits of this service.
- Attend all AmeriCorps and program specific training programs, conference calls, webinars, and other meetings as scheduled.
- Attend and participate in National Days of Service (Martin Luther King, Jr. Day and 9/11 Day of Service and Remembrance).
- Accurately provide necessary information as required to track achievement of goals.
- Positively represent the local host site, United Way, MAUW, and AmeriCorps as a citizen acting to resolve state-wide income concerns.
- When requested, represent the agency in meetings, workshops, committees and conferences. Collaborate with other I&R Associates and community agency staff on projects and special assignments.
- Respond appropriately to the cultural, ethnic, religious and personal differences present among the service population. Must also react calmly, appropriately, and accurately in a crisis situation.
- Protect consumer and client confidentiality by discussing all concerns and reactions only with designated Host Site/United Way/Community Partner team members, and within the physical confines of our offices, unless otherwise approved by the consumer, agency or defined by State and Federal Laws.

#### **PERFORMANCE REQUIREMENTS:**

- Ability to create individual rapport with clients to discuss financial matters and motivate clients to meet financial goals.
- Oral and written communication skills at a level typically acquired through completion of a Bachelor's degree program; an equivalent combination of education and experience will be considered.
- Knowledge of the Michigan health and human services infrastructure and public coverage programs.
- Ability to effectively develop and nurture relationships with a diverse group of stakeholders.
- Ability to serve independently and coordinate multiple tasks.
- Ability to incorporate strategic direction from program management and best practices from other stakeholders.
- Ability to enthusiastically communicate with community partners and clients.
- Ability to serve non-traditional hours including evenings and weekends when necessary to best reach population.
- Strong computer skills with proficiencies in Outlook, Word, PowerPoint, Excel, internet-based applications and the Microsoft operating system.

#### **MINIMUM QUALIFICATIONS:**

- 18 years of age or older.
- Able to complete a one-year National Service term. (Average full-time commitment requires a minimum of 1720 hours; approximately 33 hours/week).

- Able to travel with use of a personal vehicle including, but limited to, travel around host site locations and to Lansing and other other areas of the state for trainings.
- Ability to read and interpret documents.
- Ability to write routine reports and correspondence.
- Ability, to speak effectively before groups and actively engage the general public in outreach situations.
- Ability to interact respectfully with diverse cultural and socio-economic populations.

**Personal & Professional Development:**

- Attend agency in-services and other ongoing training opportunities.
- Participate in relevant training events or seminars to more effectively refer individuals for services.

**SKILLS:**

Must have an excellent verbal communication and active listening skills. Must be able to make accurate assessments from sensitive information provided by those seeking assistance. Must be able to work independently. Good computer skills are required. Requires ability to type proficiently, use of Microsoft office software, and have basic knowledge of social service system, governmental bodies and geography of the regional service area. Must be able to perform searches and enter data while talking with the individual. Spanish language skills would be a definite plus.

**REASONING:** Ability to define problems, to collect data, to establish facts and draw valid conclusions. Ability to think analytically, to solve practical problems and deal with a variety of concrete variables in situations where limited standardization exists.

**TYPICAL SERVICE CONDITIONS:** Service is partially performed (70%) in normal, office environment. A portion of service time (30%) will be spent performing in-field meetings and one-on-one assistance. Duties will require travel throughout the state of Michigan. Travel expenses will be reimbursed.

**TYPICAL PHYSICAL DEMANDS:**

*The physical demands described herein are representative of those that must be met by an AmeriCorps member to successfully perform the essential functions associated with their term of service. Because we are committed to inclusion of those with disabilities, reasonable accommodations will be made to enable individuals with disabilities to perform the essential functions associated with their service.*

This position requires prolonged sitting, some bending, stooping and stretching. It requires eye-hand coordination, and manual dexterity sufficient to operate a keyboard, photocopier, telephone, calculator and other office equipment. It also requires a normal range of hearing and eyesight to record, prepare, and communicate appropriate reports. In addition, this position requires travel between sites and the ability to interact with others in both small and large group settings. At times, this position may include periods

of extended physical activity, such as walking/standing at community events and/or moving and distributing educational materials.

**OTHER SKILLS & ABILITIES:** Desire to serve as part of a team. Flexibility and willingness to change. Attention to detail. Excellent interviewing and active listening skills. Objectivity and non-judgmental attitude. Respectful of worldviews that differ from one's own. Ability to communicate and interact with individuals from diverse educational, socioeconomic and cultural backgrounds. Able to travel extensively with use of a personal vehicle. 18 years of age or older. Able to complete a one-year National Service term. (Average full-time commitment requires a minimum of 1720 hours; approximately 33 hours/week).

**SCHEDULE/COMPENSATION:** This position is a one-year commitment to serve with AmeriCorps. Selected applicants will complete a minimum of 1700 hours of service (average of 33 hours per week) beginning as early as October 2014. AmeriCorps members receive a living stipend of \$12,100.00, a \$5,645 Educational Award upon completion of their term of service and basic health insurance coverage.

**EMPLOYEE DISPLACEMENT POLICY:**

AmeriCorps members may not fill in for an absent employee, even if they are absent due to illness, or temporarily placed at a different location. By law, members may not under any circumstances perform services, duties, or activities that have been assigned to an employee, or to an employee who has recently resigned or been discharged. Programs may not place a member in a way that will displace an employee or position or infringe on an employee's promotional opportunities.

The Partner hereby acknowledges by their signature that they have read, understand, and agree to all the terms and conditions of this service description.

**Please send resume to [Khollars@goodwillswmi.org](mailto:Khollars@goodwillswmi.org) or visit [www.goodwillswmi.org](http://www.goodwillswmi.org) for more information.**